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MARKETING & MEDIA
DECISIONS
NOVEMBER 1986 • $3.00

DDB NEEDHAM'S TASK-FORCE APPROACH TO THE MEDIA MERGER PUZZLE

FINDING A MEDIA JOB
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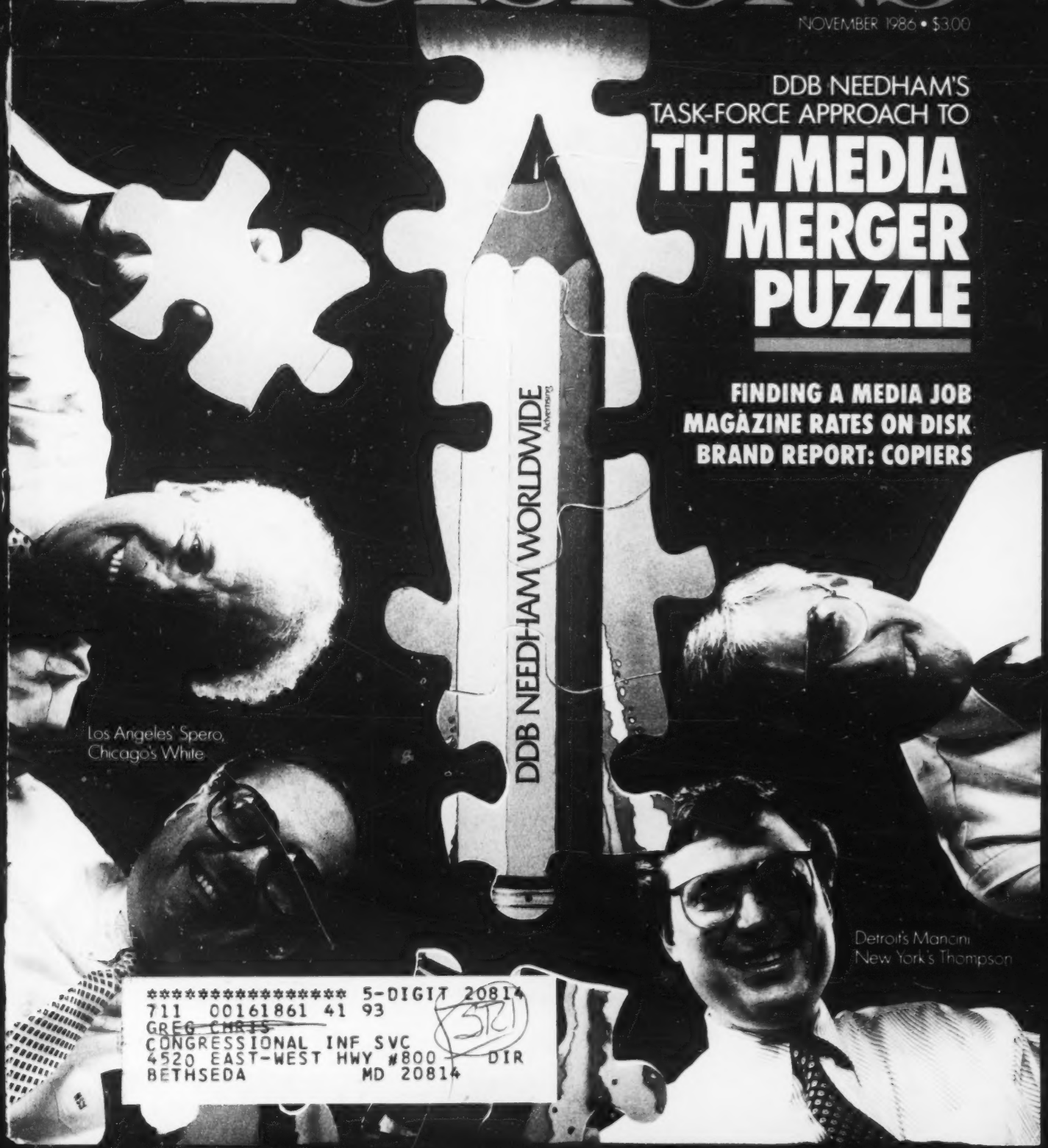

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MARKETING & MEDIA DECISIONS

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UPDATE

IS OPRAH WINNING THE SHOW?

It all depends on who's answering the question. The folks at Camelot Entertainment, sales arm for King World's *Oprah Winfrey Show*, are pleased with the lady's first numbers. Some outside sources, though, say proceed with caution.

"In Nielsen's 12 overnight markets, for the first two weeks (September 22-October 3, 1986), she's number-one in 10 of them," gloats Ric Levy, Camelot's president. *Oprah*, which appears in 134 markets, averaged a 5.5 and 5.4 rating for her first two weeks in the 12 metered markets.

Is *Oprah* the "*Donahue*-eater" she was touted to be? It's hard to say. For starters, the two shows compete head-on in only three of the overnight markets: Denver, Los Angeles and Atlanta. In New York, for example, *Oprah* airs at 10 a.m. while *Donahue* moved this season to 4 p.m.

There's more than one way to look at* Oprah*'s early numbers.

In Denver *Oprah* trails *Donahue*'s 6.2 rating/31 share with a 5.4 rating/27 share. But in Atlanta, *Oprah* pulled a 7.1/31 to *Donahue*'s 6.9/30. And finally in Los Angeles, *Oprah* did a 7.8/24 to *Donahue*'s 5.8/18.

If it looks like *Oprah* is clobbering *Donahue*, look again, advises John von Soosten, vice president of programing for Katz Television. Katz is advising his own client stations to take a look at the effect of both programs on the station's broadcasting day. For example, von Soosten thinks that *Donahue* actually builds audience for stations, while *Oprah* appears to lose audience.

In Los Angeles, for example, *Oprah*'s 7.8/24 rating for her first week out looks much better than *Donahue*'s 5.8/18 at first glance. But von Soosten says dig deeper and look at the audience bases both programs come off. *Oprah*, which airs on an ABC affiliate in Los Angeles, follows *Good Morning, America*, which did a 9.7 rating.

Fruit Juices Media Expenditures for 1985 (000)

Brand	Total	Mags	Net TV	Spot TV	Newspapers	Sunday Mags	Cable TV	Outdoor
Citrus Hill	$15,004.0	–	$8,290.9	$6,372.9	–	–	$340.2	–
Dole (pineapple)	2,637.6	35.7	–	2,520.6	81.3	–	–	–
Minute Maid (orange)	8,735.3	840.5	7,496.8	304.9	46. 3	–	46.8	–
Motts	2.3	–	–	2.3	–	–	–	–
Ocean Spray (grapefruit)*	3,740.8	–	–	3,496.8 **	244.0	–	–	–
Seneca	1,098.6	948.2	–	148.6	1.8	–	–	–
Tree Top	3,660.4	1,856.1	1,742.7	51.1	6.4	–	–	4.1
Tropicana (orange)	9,217.2	590.8	–	8,282.7	251.6	92.1	–	–
Welch's (grape)	253.0	191.4	21.0	3.3	37.3	–	–	–

Source: Leading National Advertisers; Newspaper figures compiled by Media Records *LNA breakdown not available **provided by Ocean Spray

This corrected media expenditure chart replaces the one in the September fruit juice "Brand Report."

AS THEY SEE IT

MEDIOLOGY

by Ron Kaatz
Senior vice president, J. Walter Thompson;
Associate professor Medill School of Journalism, Northwestern University

THE WINDS OF TV PRICING

In the 1976 movie *Network*, Howard Beale goes to a window and yells out: "I'm mad as hell and I'm not going to take it anymore!"

Howard's words have been echoed many times over by advertisers frustrated by network television prices. But in most cases, they found little more relief than did Howard's screams into the wind.

Today, forces are working in favor of the advertiser. For at least the short term, they promise relief from the sharp price increases of the past. Looking further into the future, however, there may be new causes for concern on the television pricing front.

Everyone knows there has never been a relationship between television pricing and the Consumer Price Index. While the CPI averaged a 7% annual increase since 1974-75, prime time CPM's rose nearly 11% a year.

Over this 11-year period, cost-per-thousand tripled from $2.61 to $7.95, while ratings declined 15% from 17.2 to 14.7 (see Table I).

The 1985-86 television season, however, saw CPM's increase only modestly. And upfront 1986-87 prime time CPM's held the line versus a year ago. There are 11 indicators that this should be the start of at least a short-term trend to relief from sharp year-to-year price hikes of the past.

Network pricing is determined by advertiser demands, the supply of time, and the availability of alternative options.

In past years, supply often could not keep up with demand and alternatives were far fewer than they are today.

Now, however, network inventory is expanding and there is an increasing focus on new options.

For the advertiser, this means a better opportunity to both establish effective media strategies *and* to know they can be executed as planned.

1.More network inventory: In 1965, three out of four network commercials took a full 60 seconds to communicate.

Twenty years later, 95% of all commercials were 30 seconds or less.

The 15-second message, which arrived less than three years ago, accounted for 10% of all commercials in 1985. And by early 1987, one out of every three messages may be a :15. This represents a significant expansion in network inventory available to the advertiser (see Table II).

2.Prime time ratings hold the line: The sharp decline in network ratings that occurred up through the early 1980's has slowed considerably. This has resulted in the "Available For Sale GRP Pool" holding the line.

3.Increased spending in cable and syndication: Between 1984 and 1986, national advertiser spending in cable and syndication increased $428 million, while network tv spending rose only $100 million.

Cable and syndication today provide both additional and alternate opportunities for an advertiser to communicate with his customers.

For every dollar spent in network television at the start of this decade, four cents were spent in cable and national syndication. In 1986, 15 cents will be spent there for each network television dollar (see Table III).

There are 11 indicators which add up to short-term relief from sharp year-to-year price hikes for television.

4.Lower CPM's and more commercials on cable and syndication: Lower cost-per-thousand in cable and syndication is coupled with increased spending in both media. A conservative 25% edge in CPM's would translate into an advertiser's ability to deliver 133 cable/syndication GRP's at the cost of 100 GRP's in network television.

Syndicated properties also carry greater commercial loads than network television does, further adding to the market of avails. The highly rated two-hour *Al Capone's Vaults* special included 26 minutes of commercials. Hoping to reap healthy ad sales from the popularity of Oprah Winfrey, King World has built 14 minutes of commercial time into her hour.

5.Fourth (or semi-) networks: Fox Broadcasting Co. — beginning with Joan Rivers in late night and extending into prime time next spring — is only

Table I
The Increased Price of Prime-Time Network TV 30's

	Average rating	CPM homes	CPM change from prior year
1974-75	17.2	$2.61	–
1975-76	17.0	2.83	+ 8%
1976-77	17.0	3.47	+23
1977-78	17.2	3.77	+ 9
1978-79	17.1	4.20	+11
1979-80	17.3	4.75	+13
1980-81	16.8	4.89	+ 3
1981-82	15.4	5.89	+20
1982-83	15.1	6.10	+ 4
1983-84	14.9	7.07	+16
1984-85	14.7	7.76	+10
1985-86 est.	14.7	7.95	+ 2
%Change	-15%	+205%	

Source: A.C. Nielsen Co.

Table II
Network TV Activity by Commercial Time

	1965	1975	1985
10 Seconds	–%	–%	1%
15 Seconds	–	–	10
20 Seconds	–	–	1
30 Seconds*	23	94	83
45 Seconds	–	–	2
60 Seconds	77	6	3
	100%	100%	100%

*Piggyback and individual

Source: TvB from BAR

Table III
National Revenue (millions)

	Network tv	Network cable	Syndication	Cable and syndication as % of network tv
1980	$4,700	$ 50	$134	3.9%
1981	5,300	105	186	5.5
1982	5,900	195	237	7.3
1983	6,900	303	333	9.2
1984	8,500	492	400	10.5
1985	8,300	637	530	14.1
1986 est.	8,600	720	600	15.3

Source: Paul Kagan Associates, Robert Coen

one source of the expanding inventory of video availabilities.

Cable also looks to increase its advertising opportunities, and the cable networks actively are discussing the development of more first-run programing.

6.A Slowing in new product introductions: The dramatic increases in *major* new product introductions slowed as we hit the mid-1980's.

7.A growing local focus: As a result of increased promotion, distribution and media costs, advertisers have sought significant local pockets of marketing opportunity. This has increased the focus on regionalization and the use of spot television.

8.Holding the line on program costs: ABC, CBS and NBC often tried to rationalize some of their price increases as the result of soaring program costs. Today, the networks have publicly gone on record to announce their many cost cutting moves.

9.A stable Consumer Price Index: After the record double-digit inflation of the late 1970's and early 1980's, the Consumer Price Index has settled in the low single digits. With marketers of consumer goods and services restraining their own price increases, large network television rate hikes are no longer tolerated.

10.A cautious advertising environment: Uncertainty as to the future economy has caused many advertisers to hold the rein on budget increases. And more than ever, agencies and advertisers are simply saying "No" to excessive network price increases.

11.A willingness to try the new: Past network rate increases coupled with today's growing number of options have created a far greater willingness on the part of many wise advertisers to actively seek alternative options.

All signs indicate that marketers can expect network rate increases in the near-term to be tempered by the hard facts of greater commercial supply, lower advertising demand and alternative options.

In planning beyond the near-term, however, certain risks may be encountered.

- How will 15-second commercials impact on network pricing if they encourage so many new-to-television ad-

vertisers that inventory tightens? Will advertisers, restricted to daytime because of budget restraints, use 15's as their entry into prime time, further tightening its supply (but making daytime even more open)?

- Will network rating declines, which have slowed, pick up again and reduce the inventory of available for sale GRP's? (It takes eight 13-rated spots to deliver the same GRP levels as seven 15-rated spots).
- Could we pay less for *quantity*, but have the *quality* of our communications suffer as a result of increased clutter and zapping?
- Will an accelerating economy and major increases in new product introductions hit as we near the 1988 Olympic/election year?
- How will syndication affect spot prices? The growth in national syndication decreases the availability of local spot positions. Will this focus more advertiser attention on network if spot rates escalate too far, too fast?

Risks remain that may bring a return to the past's tv pricing practices.

- Will the people meter affect ratings, and how will this impact on network pricing?

The next Olympic/election year "Quadrennial Crunch" in 1987-88 will be a critical watershed season for network television pricing, for if rate increases can be held down then, the trend to moderating price hikes will have become more than a short-term phenomenon.

Just as the winds constantly shift, so does the climate of the television marketplace. In this environment of stormy change . . .

We cannot afford not to experiment.

We cannot afford not to innovate.

We cannot afford not to encourage the most original media thinking that acts rather than reacts to changes in this marketplace.

In these ways, advertisers will prosper regardless of which way the winds are blowing. ■

MARKETING

by Larry Kelley
Vice president, media director, Hutcheson Shutze/Atlanta

THE GENETICS OF TARGETING

Advertising impressions will be directed to the following:

- Women, age 25-54
- Household income $25,000+
- College educated
- One- to two-person households
- VALS "Achievers"

Looks familiar, doesn't it? In fact, just about every packaged good brand will have a similar target audience definition.

It seems that the more information available to define a brand's target audience, the more the laundry list of attributes used to define a target audience grows.

Typically, two scenarios follow from a target audience definition as the one outlined above. Let's call them the "Captain Crosstab" and the "We are the World" syndromes.

"Captain Crosstab" assumes that the target audience is comprised of people who fit all those criteria. As our favorite planner cross-tabulates all these demographic characteristics into a single composite, the result is a sample of 20 to 30 people: about the same number of people who have IQ's over 200. In effect, "Captain Crosstab" gets so carried away in the quest for the ultimate target audience that the result is inactionable data.

The other side of the coin is the "We are the World" syndrome. In this case, our favorite planner denounces Captain Crosstab and defines the target audience as: women 25-54. It's actionable. It's reported in all major syndicated research services. It is not likely to miss many prospects, or non-prospects for that matter, with this approach.

Defining a target audience and providing actionable data is not as easy as the industry leads us to believe. We are caught in a trap of largely using demographics to define a target audience. Yet demographics are not always an accurate forecaster of consumer behavior.

Solution. Use the dominant trait approach to targeting. After all, Gregor Mendel did wonders with plants using this theory.

The process begins by using the dominant trait of that demographic attribute that most drives the purchase decision.

For example, in convenience foods, the key attribute isn't age or sex; it's

Exhibit 1
Television Viewership Comparison

	Women 25-54	Persons 1-2 HH	Actual % Point Difference
Quintile 1 (Heavy)	84	117	33
Quintile 2	92	105	13
Quintile 3	106	93	13
Quintile 4	106	91	15
Quintile 5	111	92	19

Source: Simmons 1985

Using dominant traits to define a target can have a dramatic effect on the choice of tv dayparts that meet your needs.

household size. Convenience foods are purchased largely by people in one- to two-person households.

By driving from this dominant trait, the media selection would be significantly different from using the traditional age/sex definition. As shown in Exhibits 1 and 2, magazine readership and television viewership have opposite trends for these two groups. Magazine readership is strong among women 25-54, while television is strong among people in one- to two-person households.

By using a dominant trait approach, a major media decision has been altered. And its intended result is improved.

Beyond this decision, let's assess the impact of this focus through television daypart selection. As the dominant trait model (below) demonstrates, adjusting television dayparts for a dominant trait can significantly alter daypart selection to reach a target.

Eventually, age/sex can be used for rating projection and analyzing post buys. This makes sense since the larger base allows for less rating variation than could be attributed to sample size alone.

The point is that by the time we use an age/sex definition, our purchase parameters have been tightly defined. The strategy and execution are woven together.

The next time a media plan crosses your desk with a montage of demographics listed under target audience, pause and reflect as Mendel did in 1865. You may discover the genetics of media planning. ■

Exhibit 2
Magazine Readership Comparison

	Women 25-54	Persons 1-2 HH	Actual % Point Difference
Quintile 1 (Heavy)	113	76	37
Quintile 2	109	88	21
Quintile 3	100	98	2
Quintile 4	97	105	7
Quintile 5	81	130	49

Source: Simmons 1985

Dominant-Trait Model

Daypart	Women 25-54 CPM	1-2 person household adjustment	Adjusted CPM	Index
Morning	$10.40	118	8.80	100
Daytime	$8.80	91	9.70	110
Prime	$18.30	98	18.70	213
Late Fringe	$15.60	147	10.60	120

Source: Nielsen

MAGAZINES

by Don Cole

Vice President, media director, W.B. Doner and Company/ Maryland

ANOTHER VIEW: RATE BASE CUTS

It seems that hardly a week goes by when we do not hear of a company's new management team selling off unprofitable divisions or making sharp cuts in overhead. Invariably, *Business Week*, *Forbes* and *Fortune* run favorable stories on this interesting "turnaround situation." The stocks of these companies usually tack on a few points.

The above scenario is in direct contrast to how we in the media business view a magazine's cutting of its guaranteed rate base. The knee-jerk reaction from many in the media community often is, "The book must be in trouble. Let's take it off our recommendation."

Admittedly, rate base cuts can be an early warning signal of a publication's terminal illness. In recent years, however, my own observation has been that rate base cuts are generally a healthy sign indicating a return to sanity on the part of the publisher.

Many books work very hard to pump up their circulation by an extra few hundred thousand. Too hard, in my opinion. The expense of buying this marginal gain in circulation is often enormous. You are also creating a monster that has to be fed annually. Today, a few bold and canny publish-

The Media School

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DAY 1 This BASIC full day is crammed with solid usable media information such as 12 media concepts, 8 media research resources, planning and buying 4 major media and 8 steps to create a media plan.

DAY 2 The ADVANCED media day highlights strategic planning issues involved with; defining target audiences, setting effective reach and frequency, geographic allocation systems, media mix and organizing a media plan.

DAY 3 Knowing how to create a media plan is one skill, presenting media plans, recommendations and con ceptual ideas is essential to career growth. This full day is spent honing media communication skills.

THE NEXT MEDIA SCHOOL WILL BE HELD:

DECEMBER
2, 3, 4 — **Chicago** • Hyatt Regency
10, 11 — **Seattle** • Stouffer Madison Hotel

JANUARY
*13, 14, 15 — **Boston** • The Copley Plaza
20, 21 — **Philadelphia** • Wyndham Franklin Plaza
27, 28 — **New Orleans** • Marriott Hotel

FEBRUARY
*3, 4, 5 — **New York** • Marriott Marquis
*3, 4, 5 — **San Francisco** • Hyatt on Union Square
18, 19 — **Atlanta** • Hotel Tower Place
25, 26 — **Cincinnati** • Hyatt Regency

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ers are realizing that it is simply not worth feeding the meter anymore. Inevitably, the circulation that you purchase via large premiums or deep discount subscriptions will come back to haunt you with high rates of turnover.

With a lower, more realistic rate base, a publication has something that is appealing to advertisers. His circulation is in strong hands. Readers pay full price for the book because they really want it and they tend to renew fairly well because they enjoy it. This translates to a relatively high level of reader interest which is an excellent environment for your ads.

Also, it is a fair assumption that many of the subscribers lost with a rate base cut were not as upscale as the subscribers that you keep long term. So while the book's audience is lower than before, it provides a purer play demographically.

In sum, our point is this: Do not overreact to rate base cuts. Take them on a case-by-case basis and you will find instances of gutsy publishers biting the bullet now but offering advertisers a solid base of readers and brighter long-term prospects. ■

TELEVISION

by Jerry Hamilton

Senior vice president, director of marketing research, Ketchum Advertising/San Francisco

15-SECOND EFFECTIVENESS

In the mid-1960's, the predominant commercial length was 60 seconds. As :30's became available (first in the form of split :60's), the controversy raged about both the effectiveness of :30's vs. :60's, and the potential impact on television viewers. However, by the early 1970's, :30's had become the industry norm and television remained a healthy medium.

In 1986, advertisers, agencies and the television industry face the same issues, only this time the debate is about 15-second versus 30-second commercials. The :15's originally saw life as part of a split :30, pioneered by Alberto Culver in the early 1980's. As of this writing, :15's are receiving fairly wide acceptance. The three major networks, as well as approximately 60-70% of local stations, accept them. This is not without some penalties, however. Some networks do not allow regional buys, and local stations are charging a premium and generally not guaranteeing separation.

The overall objective of this paper is to examine the pros and cons of :15's. The discussion will be broken into three sections, the first of which will deal with the effectiveness of :15's relative to their 30-second brothers. The second section will deal with the larger issue of what impact the increased clutter of :15's might have on television as an advertising medium. Finally, we have provided Ketchum Research's point of view on the use of 15-second commercials.

Effectiveness of :15 commercials: The key issue is the communications effectiveness of :15's versus their cost. We believe there are three components of ads which contribute to effectiveness and can be measured:

- Intrusiveness
- Persuasiveness
- Message communication

The first two components, intrusiveness and persuasion, are relatively standard measurements; the methods change slightly between research systems/suppliers but the basic assumptions are similar. Message communication is a more subjective measure and more difficult to quantify. However, in terms of industry findings,

the following is the case:

1. *On average, :15's seem to be about two-thirds as intrusive as :30's.* The recall norms differ somewhat by testing method/supplier (see Table), but in any event :15's are at minimum 62% as intrusive as :30's on average. It is interesting to note that this is approximately the same relationship as between :30's and :60's, i.e., :30's are about two-thirds as intrusive as :60's.

2. *On average, :15's are at least two-thirds as persuasive as :30's.* Again the numbers vary by method/supplier (Table), but :15's seem to be even closer to :30's on persuasiveness than on intrusiveness.

3. *There is evidence that :15's do not penalize message communication at least in terms of a number of ideas.* Mapes & Ross has found that 15-second cut-down versions of :30's communicate approximately the same number of ideas on average. This belies the fact, however, that the depth/detail of message must usually be less in a :15 versus a :30 by simple virtue of the time difference. A proprietary study conducted by a Ketchum client also indicates that changes in consumers' images of a product were more positively affected by :30's than :15's. The difference between :30's and :15's may be somewhat like the difference between an original novel and the *Reader's Digest* condensation — the condensed version must cut out some of the flavor and detail of the original. However, the basic high point of the plot can be communicated in the shortened and simplified version.

The conclusion is that, on average, :15's are more than half as effective as :30's. However, each :15 does impact consumers to a lesser degree than each :30 in an absolute sense and message potential *is* lowered.

Effect of :15's on television clutter: When tv made the transition from :60's to :30's, doomsayers predicted the demise of the medium, claiming that consumers would be turned off by the increased clutter. This did not happen and viewing continued to grow and the medium became an even more effective selling arena.

No one really knows what might happen if, in the extreme case, :15's were to become the industry norm. To date, research on these issues has involved test environments which do not simulate what the long-term effects of increased numbers of :15's might be. However, there have been findings which do bear on the issue.

1. *Most viewers do not appear to be able to judge the length of a commercial.* Viewers tend to judge the length of a commercial break by the number of commercials. Increasing the number of commercials within a pod while maintaining the length of the pod may create the perception that additional time is being devoted to advertising. ("Shorter Units: Risk-Responsibility-Reward," presented March 12, 1985 to the ARF by ABC/JWT.)

Table I
Summary of :15 Commercial Effectiveness

	:15 Commercials Index*	
	Intrusiveness	Persuasion
Mapes & Ross	62%	87%
McCollum-Spielman	80%	92%
Burke	70%	69%

*Index 100=Average for all :30's

Source: Ketchum Advertising

2. *When specifically asked, viewers would prefer to see fewer commercials, with each one longer.* The question was asked with the stated assumption that the amount of time devoted to advertising would stay the same. (*Bruskin Report*, No. 136, February 1986.)

3. *Viewers' retention of brands seen advertised has been falling since 1965.* In 1965, when :60's were the norm, 26% of consumers were able to name the brand in the last commercial seen less than four minutes after exposure. In 1974 when :30's were the norm, the percentage had dropped to 17% (Newspaper Advertising Bureau, *Media Industry Newsletter*, October 22, 1979). Part of this decline may be attributable to an increase in the absolute length of time devoted to advertising, but the reduction in length of individual commercials must also be a factor. Thus, as commercials become shorter and more numerous, long-term retention may become even lower.

All of these findings raise the possibility that the increased use of :15's could, in the long run, harm commercial television by increasing audience irritation and ultimately driving viewers away. In fact, this was the prognosis of many experts back when the shift from :60's to :30's began. While the negative effect of this previous shift in commercial format does not seem to have harmed commercial television, the competitive situation in the 1980's differs substantially from the 1960's-70's. Consumers today have more options to commercial television with the advent of cable, pay stations, VCR's and even public television. These technologies have already eroded commercial television audience to some extent and one would expect that as their availability increases, the erosion would continue.

Implications: Ketchum Research believes that :15's can be an efficient, effective advertising commercial length. The use of :15's must, however, be evaluated on a client-by-client basis — *there is no universal rule*. The decision whether or not to use :15's should be based on strategic and creative objectives for a specific client. In addition, :15's should be viewed *not only* as an alternative to :30's but also as a format which might work in conjunction with :30's or :60's.

While there is no universal rule for the application of :15's, there are some situations where their use makes intuitive sense:

1. *Established brands/reminder advertising.* If the objective of advertising for a particular brand/service is simply to remind people to use it, then :15's are a logical format to consider. This situation would occur most often for an established brand.

2. *To achieve minimum frequency.* If :15's are the only way a client can reach and/or maintain an acceptable level of message exposure (this obviously assumes that the client should be advertising on tv in the first place), then :15's offer a viable option.

3. *Adjunct to an existing campaign.* This use taps into a phenomenon that has been measured for :30's and :60's. It has been documented by Teleresearch that when a :60 has been aired for a period of time before consumers see its :30 abridgement, they often

claim to recall things in the :30 which were *not* in the shorter commercial, (i.e., things that were eliminated when the commercial was abridged). This suggests that an effective use of :15's would be as an abridgement of a longer commercial.

Commercial television implications: While no one really knows what the long-range effect of :15's will be on tv and advertising, Ketchum Media believes the following is likely:

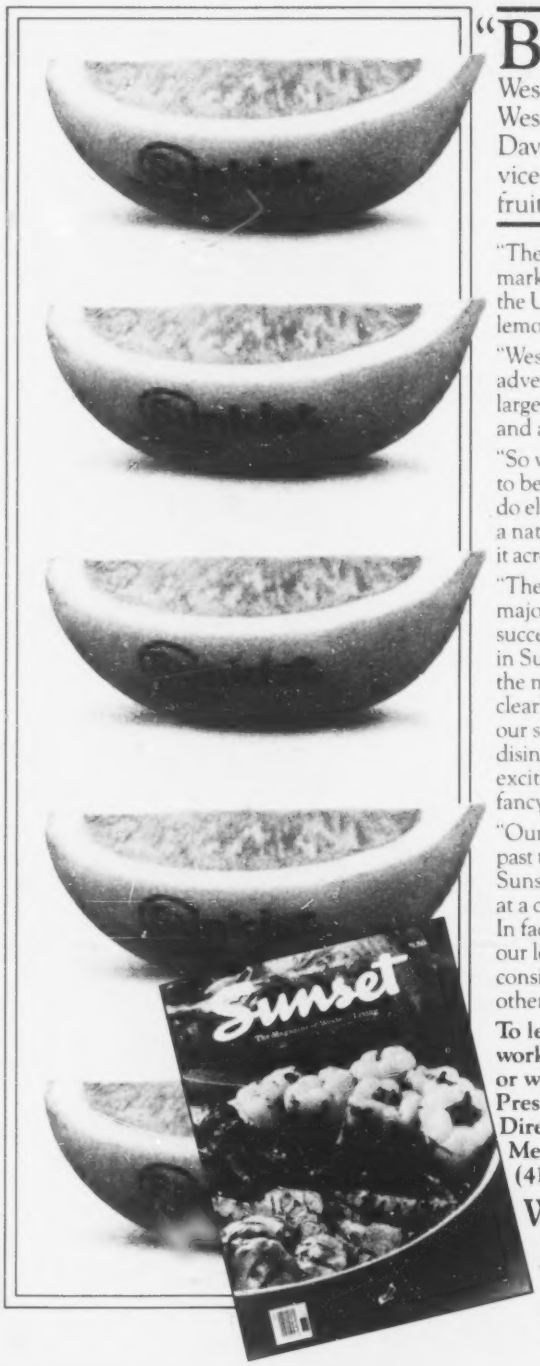
1. *Increased use of :15's will increase the difficulty of effective communication because of lower retention rates.* As the number of advertising messages consumers are exposed to increases, it will become more difficult to keep specific advertising messages planted in the mind of a consumer.

Intrusiveness, persuasiveness and message communication factor into ad effectiveness.

2. *Increased use of :15's will accelerate consumers' switch to alternative media (e.g., pay tv, VCR's).* As previously discussed, consumers have access to an increasing number of alternatives to commercial television. To the extent that commercial television increases perceived clutter, we would expect to see consumers availing themselves of these alternatives with greater frequency. We suspect that this would be particularly true of the younger generation which is growing up with the plethora of alternatives to commercial television and thus is probably not only more knowledgeable but less tolerant of clutter.

3. *Fifteens could change the complexion of network programing.* Assuming that consumers will perceive increased clutter as a result of :15's, it seems possible that consumers could react by reducing viewership of network shows on which the clutter would be most aggravating. In our minds, clutter is less annoying in a half-hour comedy than during a full-length

"Sunset became the backbone of Sunkist's Western lemon campaign."



"Because with Sunset we get both the Western consumer and the Western trade," explains Dave Bernstein, Sunkist vice president for fresh fruit marketing.

"The West is our most crucial marketing area. It has 19% of the U.S. population, 26% of our lemon sales.

"Western food buyers are adventurous. They like to buy large lemons, demand quality and are willing to pay for it.

"So what we do in the West has to be different from what we do elsewhere. We can't just take a national strategy and apply it across the board to all regions.

"The quality of Sunset itself is a major factor in our program's success. The frequency we run in Sunset is another factor, and the merchandising has been clearly a very exciting part of our success. Sunset's merchandising ideas are imaginative, exciting and really capture the fancy of the produce executive.

"Our Western sales over the past three years we've been with Sunset have been increasing at a consistent 10-12% a year. In fact, we are so pleased with our lemon campaign that we're considering expanding it to other products."

To learn how Sunset can work for you in the West, call or write Dick Bristol, Vice President/Advertising Sales Director, Sunset Magazine, Menlo Park, CA 94025. (415) 321-3600.

With *Sunset* you get what you pay for.

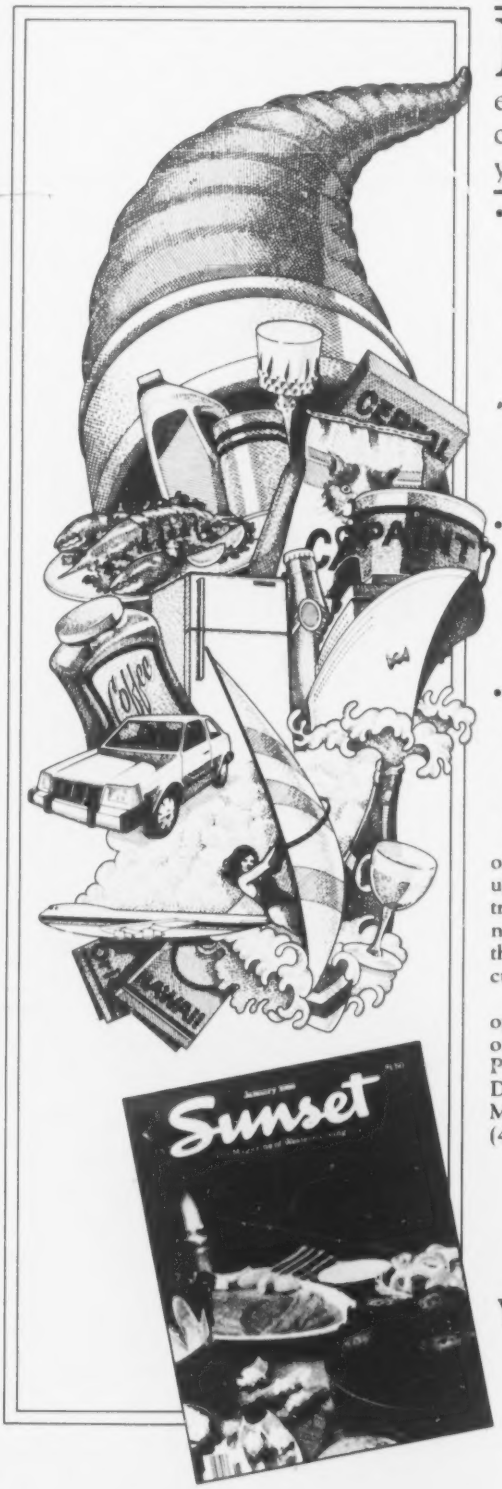
movie. It seems logical that as more and more consumers are exposed to commercial-free movies on pay tv or VCR's, the tolerance for watching movies on commercial tv with continual interruption will decline.

4. *Fifteens will drive up the cost of all television advertising.* The creation of :15 spots will make television an affordable medium for countless new advertisers, i.e., companies who could not previously afford to advertise on television. With a larger pool of advertisers and a limited number of commercial minutes, the media costs would most certainly rise. This may, in the long run, drive the new/marginal advertisers back out of television, especially if other media become more aggressive in response to :15's. This has not yet begun to happen, but may be due to the general economic softness currently being experienced.

5. *Isolated :15's will be priced higher than half the cost of :30's.* Since the television industry is not entirely supportive of isolated :15's, we would expect them to charge a premium, i.e., more than 50% of the cost of a :30. A similar situation exists in magazine advertising, where the cost of a half-page ad is higher than 50% of the cost of a full-page ad. At this time, local stations are charging a premium while the networks are generally not. Other restrictions, however, are in effect limiting their use.

In summary, there are no simple answers for the use of or ultimate impact of 15-second commercials. The decision should be approached in the same manner as all advertising issues, namely by studying the specific situation. We will continue to monitor the impact of :15's on the television industry, but firmly believe that if :15's turn out to be detrimental to the medium, the market will adjust itself accordingly. Therefore, since :15's are becoming available as an additional advertising format, they should be included in our considerations in order to provide clients with the most effective, efficient advertising possible. However, we feel strongly that before making drastic changes in media plans (e.g., from all :30's to a mixture of :30's and :15's), the effect of the change should be tested in the marketplace. ■

Harvest the West first.



Most likely you'll find that Westerners represent the cream of the crop for your goods or services.

- The West claims the highest consumption indices in the country for 80 major food categories—including top-of-the-line, health and nutrition, ethnic and gourmet foods, bottled water and wines.
- For all types and reasons for travel, Westerners are on the go more often than other U.S. residents—an average of 15% more.
- Westerners use their wheels more. Half (52%) live in 2+-car households. And one out of three Western households sports at least one truck. Both figures are the highest in the U.S.
- The lifestyle may be casual, but the goods are quality. Westerners are more likely to buy silver, crystal, china, plus blenders and food processors than other regions.

Sunset delivers the cream of the cream: 5 million active, upscale Westerners. First to try new ideas and services or new twists on existing ones, they're likely your best customers.

To learn more about your opportunities in the West, call or write Dick Bristol, Vice President/Advertising Sales Director, Sunset Magazine, Menlo Park, CA 94025. (415) 321-3600.

With *Sunset* you get what you pay for.

BRAND REPORT

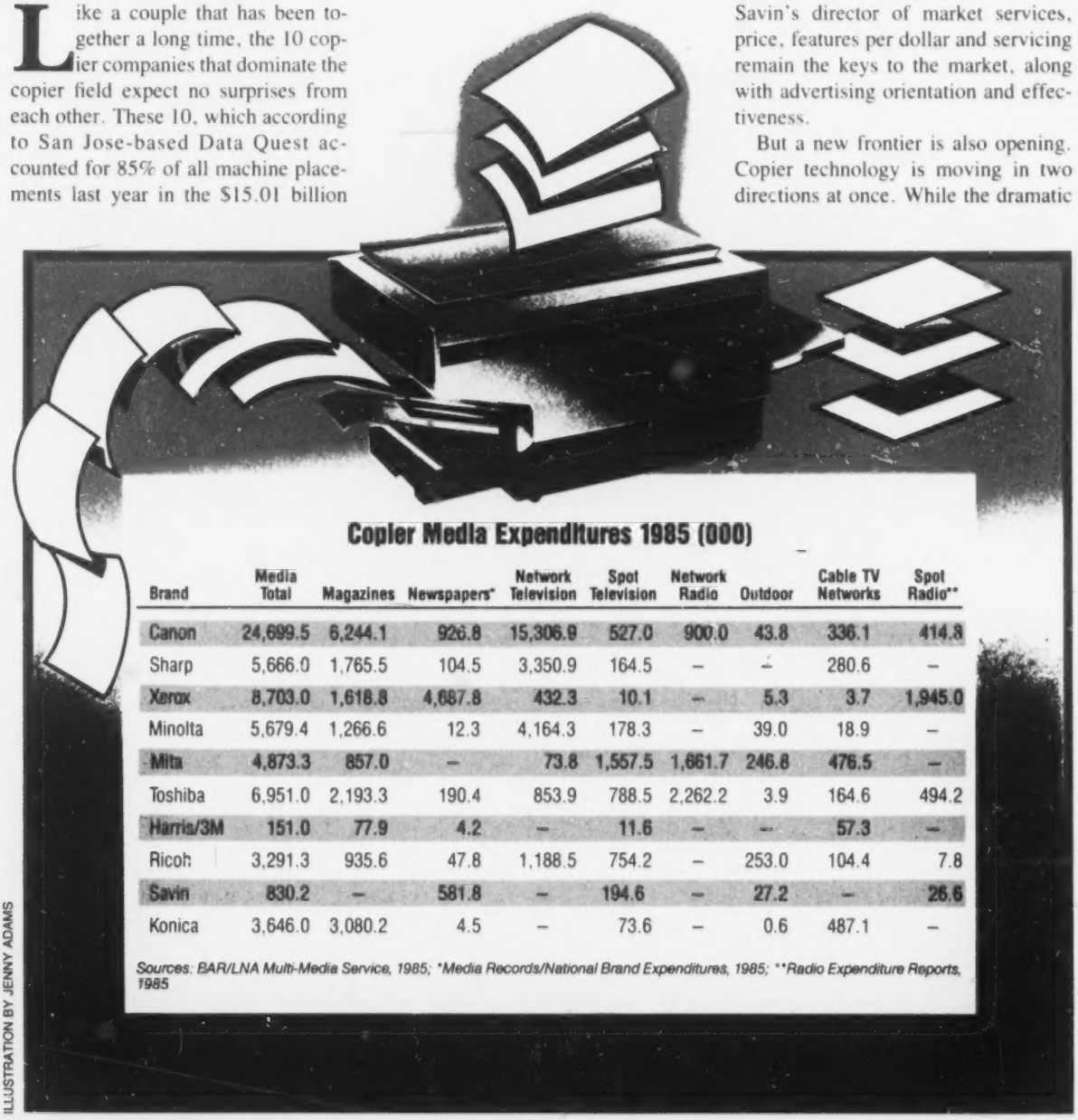
No. 137: Copiers

DOUBLE PLAY!

by Carl Weinschenk

Like a couple that has been together a long time, the 10 copier companies that dominate the copier field expect no surprises from each other. These 10, which according to San Jose-based Data Quest accounted for 85% of all machine placements last year in the $15.01 billion copier arena, are comfortable with their quality. Instead, says Steve Mikula, Savin's director of market services, price, features per dollar and servicing remain the keys to the market, along with advertising orientation and effectiveness.

But a new frontier is also opening. Copier technology is moving in two directions at once. While the dramatic



Copier Media Expenditures 1985 (000)

Brand	Media Total	Magazines	Newspapers*	Network Television	Spot Television	Network Radio	Outdoor	Cable TV Networks	Spot Radio**
Canon	24,699.5	6,244.1	926.8	15,306.9	527.0	900.0	43.8	336.1	414.8
Sharp	5,666.0	1,765.5	104.5	3,350.9	164.5	–	–	280.6	–
Xerox	8,703.0	1,618.8	4,687.8	432.3	10.1	–	5.3	3.7	1,945.0
Minolta	5,679.4	1,266.6	12.3	4,164.3	178.3	–	39.0	18.9	–
Mita	4,873.3	857.0	–	73.8	1,557.5	1,661.7	246.8	476.5	–
Toshiba	6,951.0	2,193.3	190.4	853.9	788.5	2,262.2	3.9	164.6	494.2
Harris/3M	151.0	77.9	4.2	–	11.6	–	–	57.3	–
Ricoh	3,291.3	935.6	47.8	1,188.5	754.2	–	253.0	104.4	7.8
Savin	830.2	–	581.8	–	194.6	–	27.2	–	26.6
Konica	3,646.0	3,080.2	4.5	–	73.6	–	0.6	487.1	–

*Sources: BAR/LNA Multi-Media Service, 1985; *Media Records/National Brand Expenditures, 1985; **Radio Expenditure Reports, 1985*

ILLUSTRATION BY JENNY ADAMS

headlines are reserved for breakthroughs, the movement of features downward may offer more substantial news. Pat Mayo, Savin's manager of competitive information, points to a "trickle down" of features that means more for less money to the consumer. The result opens the industry to a whole new line of potential customers.

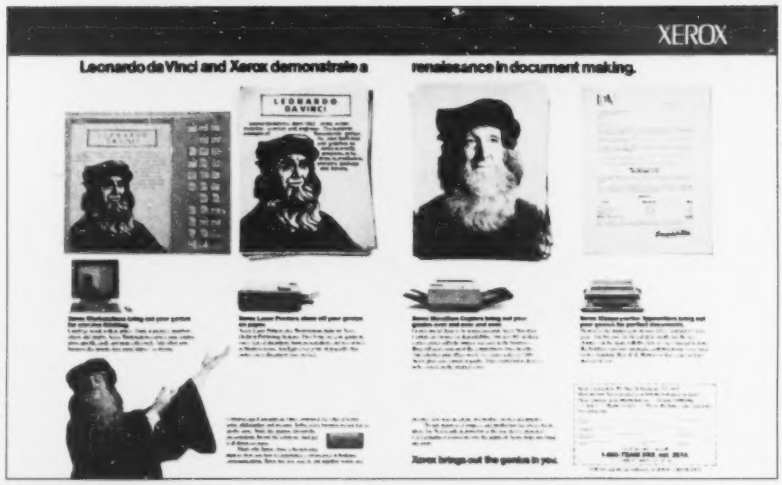
Data Quest, according to a 1986 report, breaks the copier market into eight segments. At the low end is the personal copier, which makes 1-12 copies per minute, can handle an average volume of 400 copies per month and lists for approximately $1,100. From there, we move up: segment one-A offers 1-20 copies per minute, a volume of 2,000 per month and an average 1986 price of $1,650; one-B, 15-20 copies, 5,000 volume, $2,700; two, 21-30 copies, 8,000 volume, $4,300; three, 31-45 copies, 18,000 volume, $6,320; four, 40-75, 32,000 volume, $9,250; five, 70-90 copies, 65,000 volume, $22,200-$62,900; and six, 91+ copies, 232,000 volume, $43,200-$129,775.

Competition is fierce within this family. The high end is considered saturated, while the middle to low ends, which see most of the activity, are in a state of flux as their markets develop. According to Leading National Advertisers, $63,184,000 was dished out for advertising by copier companies last year. The lion's share — about $50 million — was split almost evenly between magazines and network television, and targets ranged from senior business decision-makers to lower-echelon office managers, most of whom are women, who have a lot of input into the purchase of office machines, and consumers, for new lines of personal copiers. Ads tend to be image oriented rather than model-specific, which makes sense due to the marketers' long list of products.

Interviews indicate that ad expenditures are likely to equal or surpass that LNA total this year. "There are a meaningful amount of sales to be had. No one is going to cut back on efforts," comments David S. Leibowitz, an analyst with American Securities in New York City. "I am expecting the high rate of advertising and promotion spending to continue."

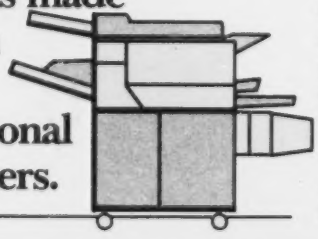
Of the top 10 companies by unit placement, eight are Japanese. This, of course, makes the position of the yen a vital topic. The currency's strength in the last six months, according to Brian Fernandez, an analyst for Nomura Securities in New York City, is causing an increase in landed costs and therefore is affecting profit margins. "They are not as aggressive as they'd like to be," Fernandez adds.

Bruce English, a research analyst with Data Quest, points out that prices rose in February and June of 1986. So far, he says, there has been no significant impact on consumer prices, and a rumored small third round of hikes, if indeed it comes to pass, may be weathered without costing the consumer. He theorizes that the real danger would come with a fourth hike. "You might be talking about significant impact," he warns.



Opening page to this spread offers to bring out the "genius" in you.

Canon dominates in placements partly because of the inroads it has made with its personal copiers.



New features, meanwhile, could further fuel price hikes. One of the flashiest trends in copier features is color. Data Pro of Delran, New Jersey, answers consumer and vendor questions on copiers, and inquiry totals are believed to provide an accurate picture of what products are hot. According to consultant Juneann Kasper, generic questions on color copiers are running a strong third behind specific questions regarding two copier models, the Xerox 1012 and the Canon 8570.

Tom Veilleux, the senior editor of *The Office* magazine, feels that color is the battleground of the future. His sentiments, while not universal, are echoed in many quarters. Still, English indicates that color "is taking its own sweet time" about providing the impact it was expected to have.

Making copies fast is still a key sales point. Despite the state of the yen, Veilleux expects the Japanese to make a play for the high speed, high volume market. This is the only area now dominated by the Americans.

There is also a move by companies toward more modular units. This allows the addition of new features as the market and its needs evolve.

And then there is the market's low end. The personal copier segment is now dominated by Canon. It is also a major reason for Canon's lead in copier placements. This is one of the few unsaturated segments of the market, and at the bottom end, according to Toshiba spokesman John Lesser, "the number of users is unlimited." Many

LEAD STORY.

Here's one for the books. Mendelsohn reports that for every advertising dollar spent, HBR delivers more affluent executive, managerial and administrative adults than Forbes or Fortune. If you want to reach the people at the top, reach for the Review.

Executive, Managerial, Administrative Adults
Readers per $/4-color Source: MMR 1985 (1986 rates)

Harvard Business Review
New York (212) 972-0740
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marketers have added personal copiers to their product lineups, hoping to copy Canon's success.

The term personal copier, of course, is a bit of a misnomer. These units are designed for small and home offices. The trick — and the thing manufacturers are banking on being able to do — is to convince potential users that investing in such units beats running out to the drug store or the library to make copies. To some extent this is a market manufacturers may jump on by default: It takes a lot of personal copier sales to equal the profit from one segment-six machine.

Logically, a push to sign major corporations — those in the Fortune 1000 — will continue. The big organizations are seductive places for copier salesmen and pitchers because of the chance of selling a variety of copiers at each location through one central buy.

On the horizon is a blurring of the traditional lines between copiers and other technologies. At least two companies, Toshiba and Sharp, have taken their facsimile machines off the shelf and given them new attention.

CANON USA

These are good days for Canon USA. They are, by far, the leader in placements; Jack Klugman is helping them to make connections with lower-end consumers; and they are expanding upward into more sophisticated segments. Canon now holds 28% of the field, says Data Quest, and placed 299,600 in the July-June 1986 measurement period. (Data Quest placement figures are combined gross sales and rentals.)

The company is generally credited with being the force behind the creation of a whole new segment of copiers. The use of a cartridge on small machines made units reliable, relatively cheap, non-work-intensive and non-intimidating. Suddenly, the idea of a small office having a copier was not only feasible, but cost-effective.

Hajaime Harai, the head of corporate public relations for Canon USA, indicates that, for the time being, the company is practically alone in the true personal cartridge copier world, with about 90% of the market. He expects tougher competition to arrive soon. According to Hirai, many of the other

Canon is gradually expanding its line of personal copiers.

small copiers on the market are not quite as easy to use, though the size and price may be comparable. "Other companies," he says, "introduced similar sized and priced copiers, but they still need periodic maintenance. So it's harder for them to expand their market share."

The cartridge rationale can be seen filtering upward to the more business-oriented segments in the form of stripped machines that can be outfitted with modules offering options, making them viable for a score of widely divergent uses.

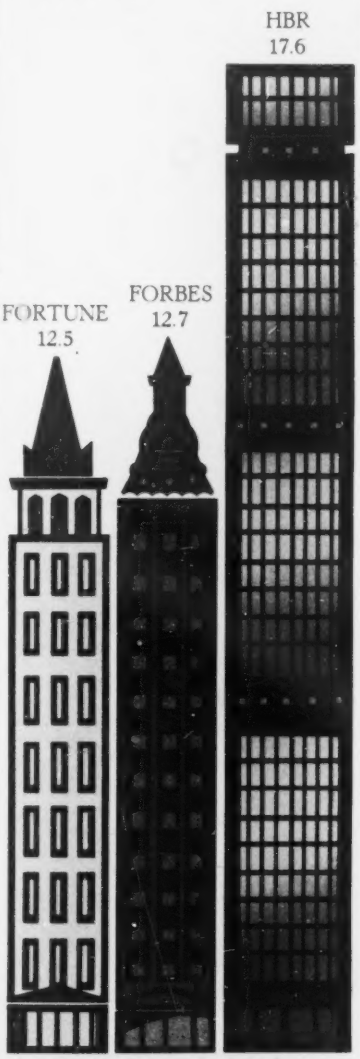
The people at Canon's advertising agency, DCA, the advertising unit of Dentsu, quickly make the point that the company is more than a personal copier supplier. It is true that more of its placements are made on that level, but strength is found in varying degrees in the first four segments of the market. Recently, segment five was breached, making Canon one of the first among the Japanese to move to higher volume machines, long a preserve of American manufacturers.

Canon's share is more than double its nearest competitor, Sharp, which placed 113,900. It should be remembered, however, that the dollar comparisons between other companies and Canon will be closer than the placement percentages because personal copiers are less expensive.

Mariko Kobayashi, DCA's senior account executive for Canon USA, reveals that the company "concentrates on network and puts emphasis on the

SKY HIGH.

The one publication read by more affluent professional/managerial men in companies with more than 1,000 employees isn't Forbes or Fortune. It's HBR. If you want to reach the people at the top, reach for the Review.



Men, Professional/Managerial, 1,000+ Employees
Reade.s per $/4-color Source: MMR 1985 (1986 rates)

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new products at the time of their introduction" when scheduling media.

Among the television buys for the year, said Harai, are *Monday Night Football*, other sports and the network evening news. Kobayashi indicates that the principal print buys include the *Wall Street Journal*, *Business Week*, *Time*, *Fortune*, *Forbes*, *Working Woman* and the trade books. Kobayashi jokes that the ads were "all over, in just about everything." Radio is not being used in the current campaign, however. Billboards, according to Hirai, are part of the strategy in New York, Chicago, Los Angeles and Atlanta.

In addition, Canon USA just broke an $8 million advertising campaign for the personal cartridge copiers in October. It features stalwart Jack Klugman along with actress Beckie Price. Her role as Klugman's agent should appeal directly to women, a strategy that is getting more common as they're being shown to have great input in decisions and first contact with visiting salespeople.

Kobayashi adds that the creative for the NP division — higher segment copiers — is "more product specific. They tend to highlight features of the key products."

Certain things about the Canon advertising philosophy emerge. The first is money. Ritter points out that it appears Canon has an "enormous" advertising budget. The fact is testified to by Kobayashi, who adds that one of the company's aims is to outspend the competition. Hirai said "Canon is pretty much an advertising oriented company. It's that way with the cameras, too. We have had good experience in advertising."

Kobayashi notes that Canon "advertises to support dealers as well as to inform consumers." She says the company "is looking for consistency in looks and is carefully targeting to specific markets . . . Advertising is used to develop new markets and, by developing new markets, they can supply the goods to them."

SHARP

Sharp, whose 113,900 1985 placements leave it second in the United States to Canon, displayed its divergent and wide-ranging reach at the National

Sharp uses Raphael to demonstrate its color capabilities.

Office Machine Dealers Association Show in July by introducing machines in segments as far afield as the personal copier category and segment four.

The company, which extends into fifth segment, obviously has a total market coverage philosophy. Dan Infanti, the manager of corporate communications and marketing, confirms that Sharp is aiming "at everyone from the ma-and-pas to the Fortune 1000 companies."

Data Quest credits Sharp with 11.0% of the market. Sharp has taken a "unique" step in attacking the low-end office equipment products segment by establishing a personal office equipment division. It will use major retailers worldwide to create channels of distribution to the low-end copier and office product market.

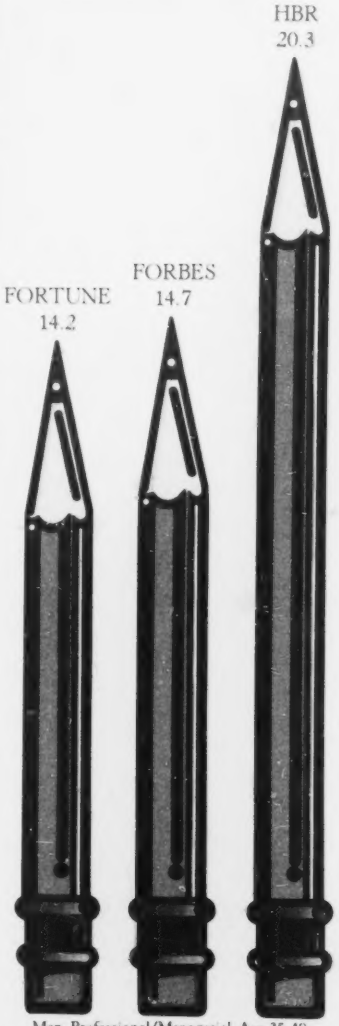
This is a prime example of the burgeoning potential seen in the low-end office equipment market. Many insiders feel that virtually all of the potential users at the upper echelons already have machines. The fight at those levels is to offer good enough deals or feature packages to attract businesses currently using product from another vendor. At the low-end, however, the market is not as established.

Copiers are among the product groups mentioned as supported by Sharps's $20 million fall and winter ad campaign via agency Scali, McCabe, Sloves.

The low-end line will be featured on television through June of next year via major exposure with ABC television

TAKE NOTE.

Mendelsohn points out that for every advertising dollar, HBR delivers more affluent professional/managerial men aged 35-49 than Forbes or Fortune. If you want to reach the people at the top, reach for the Review.



Men, Professional/Managerial, Age 35-49
Readers per $/4-color Source: MMR 1985 (1986 rates)

Harvard Business Review
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and an agreement with National Football League Films. The full-color copier ads, like Xerox's, will feature a legendary artist: Raphael.

A continued dedication to cooperative and yellow pages advertising will be financed independently of the $20 million figure.

Print advertising will include placements of as yet undetermined copiers in the major business and trade books. Consumer magazines will play a big role. Periodicals including *Venture*, *Time*, *Forbes*, *Fortune*, *People* and *Sports Illustrated* will carry ads heralding Sharp products.

XEROX

When Xerox switched agencies in June, leaving Needham Harper Worldwide for Ted Bates, the move was punctuated with an ambitious new advertising campaign.

The "Team Xerox" concept will be pushed with as much as $80 million in advertising during the next year. The large amount, of course, should not be compared to advertising outlays by other companies, most of whom quote expenditures on copiers alone. Bates will get about half of the $80 million. The rest will go for direct mail (Lowe Marschalk), recruitment (Bernard Hodes) and in-house projects.

The "Team Xerox" approach is significant as a likely harbinger of things to come as office integration becomes a growing trend and eventually an across-the-board reality.

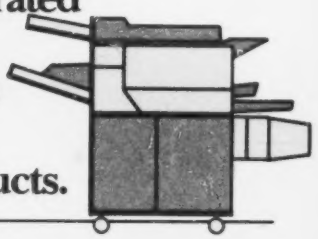
Xerox has a strong presence in mid-size machines and is the predominant supplier of large units. Peter Hawes, spokesman for the company, says the advertising target is senior and middle-level management, MIS and data processing professionals, small business owners, secretaries and purchasing agents.

Data Quest estimates that Xerox collected 10% (107,700) of the placements made as of June 1986, putting them behind Canon and Sharp.

The same amount is being spent this year as last on advertising, said Hawes. The television portion of the campaign got off the mark on August 20th with a 60-second spot on *This Week With David Brinkley*. Three days later, a three-page advertisement appeared in *USA Today* and the *New York Times*. Less than a week after that, the insert ran in the *Wall Street Journal*. Hawes indicates that ads in newsweeklies and business and trade publications and "some individual, special things" will follow. There is no budget for radio during the current campaign.

The print ads say "Team Xerox"; the broadcast spots will just imply that message. The strategy, says Hawes, is to ballyhoo "the entire office integration market: copiers, printers, work stations" as an interconnected team.

"Team Xerox" may be the wave of the future with its integrated ad angle and products.



The introductory 60-second spot features actor John Wood as Leonardo Da Vinci. It includes a desktop publishing system, memorywriter electronic typewriters and marathon copiers. The campaign's theme is "Xerox brings out the genius in you."

Michael Kirby, Xerox corporate advertising and promotion director, notes, "The new advertising positions Xerox as an innovative office product company and one whose products make it easier for everyone to be a genius at creating and producing better documents. Although new, the campaign is rooted in the Xerox heritage as the friendly, creative problem solver, always accessible to the customer."

MINOLTA

Minolta gathered, according to Data Quest, 6.8% of the placements as of June 1986. According to information supplied by their agency, Bozell, Jacobs, Kenyon & Eckhardt, the company's predominant strength is in segments one-A, one-B, two and three.

They recently entered segment four. The target audience is adults between 25 and 54 years of age, with a 60/40 male to female ratio.

Minolta will spend about $17 million on advertising during fiscal 1986. Officials broke the amount down this way: Spot television will command 46%, network radio 12%, consumer magazines 35%, trade magazines 1.5% and newspapers 5.5%. The scheduling will favor January through July and September through November buys.

Newly introduced products are featured in the print ads. Product orientation determines which publications are used, though it has become a practice, according to its agency BJK&E, to break new advertisements for new products in *USA Today*.

BJK&E reports that the new campaign uses a theme of friendly visitors from space to dimensionalize and humanize the equipment.

The Kiwanis Magazine Readers
Business Executives . . . Professionals . . . Community Leaders

Now You Can Meet Them Head On Through The

KIWANIS MAGAZINE SPEAKERS BUREAU

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MITA

Officials at HCM, Mita's U.S. advertising agency since February of 1984, are unabashed in their enthusiasm and seem to have the figures to back it up. The product they sell has, they say, enjoyed 60% annual growth for each of the last five years. During that time, Mita has moved from twelfth to fifth place in the placement rankings.

Mita is a company with a difference. It is the only one in the top 10, placement-wise, that only makes copiers. This is a double-edged sword: The downside factor is lack of recognition; the positive element is that once people are aware of the difference, it becomes a tremendous sales point.

The company enjoyed 6.6% of the placements says Data Quest. The majority were sold in segments one to three, with a small amount in four.

James E. Rosiello, HCM's vice president and management supervisor, explains that the aim is to capture adults in the 25- to 54-year-old age bracket, the professional and managerial class. Like Harris/3M, special attention is paid to women. "We say women are 50%, but it could be more," adds Rosiello.

The orientation of the advertising is summed up by the "All We Make Are Great Copiers" tag line. The budget was about $5 million last year, but is expected to grow by about $1 million in 1987. While final plans have not been solidified, Rosiello reveals that next year's advertising should not differ significantly in style or media from this year's campaign, with the exception of a few longer spots to accompany the 10-second ads now in use.

The key markets are New York, Chicago, Los Angeles, Atlanta, Dallas, Houston, Boston, Detroit, San Francisco and Washington, D.C. Last year's budget saw 36% go to radio, 14% to print, 39% to broadcast television and 10% to cable. An unspecified amount of billboard advertising was done in the major markets.

The majority of the broadcast television spots will be on late local news airing on network affiliates. The balance will be shown during spots programing. Cable ads will be mostly on CNN. Cable sports will be addressed with some exposure on ESPN and more on WTBS. The WTBS buy, said Ro-

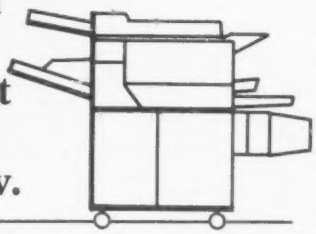
siello, will be on broadcasts featuring Atlanta teams.

The print advertising will feature "junior pages" in the *Wall Street Journal*, and ads in women's magazines such as *Working Woman, New Woman* and *Savvy*.

A great emphasis is being put on radio. Drive time and weekend day spots will be heard on CBS, ABC Information, ABC Direction, Katz Touchstar, United Stations II and Mutual Broadcasting. Syndicated shows with Mita sponsorship will be *Bob Costas' Sports Flashback* and *The Wall Street Journal Report*.

Rosiello feels that a 10% placement share is not out of the question in the near future. He points to a survey conducted by the CA Pesto Company that said Mita's total awareness rate rose from 34% to 43% between June 1985 and June 1986.

New management led Savin back into advertising, both in print and on tv.



TOSHIBA

"Toshiba is a mid-range copier company," says John Lesser, president of his Lesser & Associates and Toshiba's spokesman. According to Data Quest, it has about 5.0% of the market, with machines in segments one to three. He indicated that the aim is to capture 10% in the near future. "The increase in sales," he said, "is due somewhat to a change in the person we are aiming at. Five years ago it was the owner of a small- or medium-sized business. Now it is larger offices, larger companies. We are aiming at the corporate decision-makers, the central decision-makers."

Another change at Toshiba — and one symptomatic of the industry — is the launching of a facsimile business and its placement within the copier division. Lesser said that Toshiba spent about $6 million on advertising last year. The figure, he indicated, will jump to about $10 million this year, with about 95% of that going to copiers and the remainder to facsimile.

Toshiba's ad money will be spent, in order of importance, on television, print, direct mail, radio and outdoor advertising via agency NW Ayer. The broadcast television buy will focus on evening news on major channels. The cable advertising will hit CNN.

Print expenditures will be in the traditional books and newsweeklies, including *Time, Newsweek* and *Time's Business Edition*. Radio expenditures will center on network stations during morning and evening drive times. The direct mail aspect of the marketing, which Lesser says is responsible for much of Toshiba's success, is coordinated through dealers by Smith, Hemings & Gosden, a division of Foote, Cone & Belding.

Finally Lesser indicates that outdoor advertising will be done in at least five major markets: Los Angeles, New York, Atlanta, Chicago and Dallas.

"Toshiba has been on a roll the last few years," says Lesser. "They had a lot of good luck, a lot of things have fallen their way. They have increased their presence tremendously."

HARRIS/3M

A new entry — sort of — in the copier marketplace is Harris/3M Document Products. It was christened at the beginning of the year. The Atlanta-based organization initially employed 2,500 people. It is an equally owned joint venture of the Harris Corporation and 3M's Information Systems Group. The company has indicated that it expects to do about $400 million in sales during its first year.

Of course, the new entity is not starting from ground zero. Last year, 3M's copier division made 4.8% of the placements reported to Data Quest.

The new company originally offered six facsimile machines and nine copiers. The copiers are in the middle- to low-level segments. The initial advertising, which ran during the early sum-

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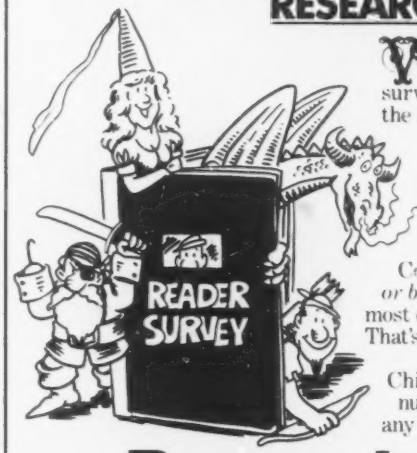
ADULT MEDIA BUYERS COUNT ON RESEARCH USA



When a publisher shows a reader survey conducted by Research USA the figures aren't fairy tales.

They're honest, projectable data you can base your buying decisions on.

Our surveys meet the highest criteria because they're built on unbiased samples, non-leading questions and honest tabulations. Consistently high response rates (*50% or better*) ensure their acceptance by the most demanding professional standards. That's no fairy tale, either, it's *a guarantee!*

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mer, concentrated on introducing the company to the public. The catch phrase was "Try Me."

Last year, according to marketing communications manager Gary Benner, Harris/3M's advertising was "almost zero compared to what we are doing." The latest phase of the $10 million introductory effort, he says, will last from October through the beginning of November.

The campaign is a creation of Ogilvy & Mather. The new ads, like their predecessors, are designed to create an identity and awareness for the new company with spots on all three networks and cable. Benner identifies the buy as prime time, early and late night television.

Magazines will also be tapped by Harris/3M. *Forbes* and *Time* were mentioned by Benner.

There will be no radio and some billboard. There is an ongoing direct mail campaign funded independently of the $10 million figure.

Benner indicates that the ads are intended to influence women because of the high percentage of female secretaries, office managers and other office personnel who have first contact with a visiting salesperson and significant influence on the purchasing decision.

The introductory ads will not feature any particular copier, but instead focus on the people selling and servicing them. This fits well with the prevailing industry feeling that quality is a given with the vast majority of companies and that the battle will be won or lost on other battlefields, including service and support. "They're unique ads," said Benner.

Ogilvy & Mather is behind Harris/3M's new tv-heavy campaign.

RICOH

Ricoh, with 4.6% of the placements, concentrates in the lower- to mid-range segments but is expected to enter level five in the near future.

According to ad manager/corporate communications spokesperson Ron Mowrey, Ricoh will address all areas of the market, from "small to mid-size and Fortune 1000 companies."

Advertising budgets with agency Chiat/Day were not divulged, but Mowrey does volunteer that expenditures "could be larger, significantly larger" than last year. That fact, even without specific figures, reinforces the feeling that copiers are seen as a growth market, and an advertising commitment is seen as vital to maintaining and enlarging market share.

Ricoh's advertising does not highlight a specific machine, Mowrey says, but is instead intended to create brand awareness. In this light, the current campaign and next year's may be the groundwork for product-specific ads.

This, however, is purely speculation. What is sure, according to Mowrey, is that the company hopes to attract the entrepreneurial types and those with buying influence in top companies. To this end, spots will be taken on *Monday Night Football*, during the United States Open Golf Championships and in other sports events and network newscasts. Mowrey notes that, at least for the time being, high costs preclude prime time television advertising. Magazine ads will center on the newsweeklies and papers like the *Wall Street Journal* and *USA Today*. In addition, the office publications and trade books will gain insertions from the company.

Additional information on the direction of the company was supplied by Data Quest. They indicated that other parts of the advertising campaign include a cooperative program, dealer tag lines in regional editions of *Time*, *Newsweek*, *Sports Illustrated* and *U.S News & World Report*, college publications and radio spots. The company has also, according to Data Quest, upgraded its dealer support in a number of ways, including computerization of testing procedures for sales reps, sales training, service support, dealer/manufacturer joint label supply program and a direct mail campaign.

Mowrey is happy with the progress Ricoh has made and the advertising campaign that will flow from these products. "I think the new advertising campaign presents Ricoh in a very professional manner," he said.

SAVIN

Savin is another company that is evolving toward a bigger commitment to the copier field. The company garnered 4.4% of the market, according to Data Quest's Bruce English.

Until last year, Savin was out of the national advertising arena all together but a new president, CEO and other top management have led the company back into the fray. Agency is Korey, Kay Partners.

The machines the new advertisements will be pitching are mostly in segments three and four. Savin's strategy — which is not unique among copier companies — is to concentrate on big accounts. Savin hopes a go-ahead from corporate headquarters will mean both multi-location placements and more than one placement at each lo-

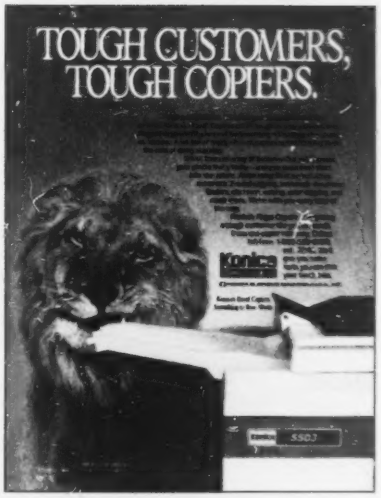
#1 in Maine and Northern New England
166,000 weekday readers
211,000 weekend readers
Contact your Sawyer-Ferguson-Walker representative or call Roger Choquet at 1-207-942-4881.
Bangor Daily News
The Maine Choice.
Source: Belden Associates, Dallas, Texas, Oct.-Nov. 1984.

cation.

Being prepared for the multi-department placements will mean having appropriate and widely varying machines ready. To this end, product manager Mark Pollack explains that the company is expanding its involvement in the modular concept. This, he says, will allow major accounts to buy a standard machine and outfit it in many diverse ways.

Steve Mikulka, director of market services, says the big emphasis is on tailoring the machine to the department. Savin's decision to exploit the modularization strategy may have gone hand in hand with the company's newfound advertising energy. This took the form last year of network television, business magazines and local newspapers in major markets.

"The company needed a quick shot in the arm to get off the mark," notes Mikulka. The quickest shot, of course, is television. A "lion's share" of an initial $3 million investment was spent on 15-second spots on network news and business breaks in April, May and June.



Royal Business Machines became Konica at the beginning of 1985.

The company hopes to push upward with advertising plans for the rest of the year that include expanding on the foundation formed last year. Four full-page black and white inserts each in *Business Week*, *Forbes* and *Fortune* and six insertions in newspapers in 14 branch markets are the centerpieces. That part of the campaign is to cost slightly over $300,000.

Though specific media plans are not yet set for next year, Mikulka indicates that the company can be expected to do "as much, if not more" national advertising in 1987.

KONICA

Konica, until the beginning of the year, was Royal Business Machines. The antecedent company was tenth in placements during 1985 with 4.0%, but according to director of advertising Sy Tyler, "Konica is second, I believe, to Xerox in major accounts."

He points out that the company is one of the few major companies that operates on both a wholesale and retail level. The latter accounts for 20% to 25% of the business, the former the balance.

Though Tyler refused to go into specifics, he said Konica is planning to buy cable, network and spot ad time next year. Print buys will include office trade magazines and the business weeklies. Agency is Harland & Tine & White. ■

THE GLOBE'S NOT HERE.

One issue of our Providence Sunday Journal and Providence Journal Bulletin reaches more than 82% of all the adults in our market. The Boston Globe and the Herald deliver less than 8.5% each. So, if you want to talk to the people in Rhode Island and southeastern New England, you want to talk to us. Call Bill Peckham, Manager General Advertising at (401) 277-7172 for our continuing market study. And he'll give you the rest of our story.

Providence Journal·Bulletin

Represented Nationally By Cresmer, Woodward, O'Mara & Ormsbee.
Source: Providence Area Continuing Market Study – 1985.
Daily and Sunday combined net reach.

A Tale of Two Cities

In either the best or worst of economic times, it doesn't make sense to buy newspapers that can't effectively reach the whole Seattle-Tacoma CMSA. Though Tacoma is but a mere 35 miles south of Seattle, it is a market largely unreached by Seattle newspapers.

If you want to reach the entire metro area, add The Tacoma News Tribune to your advertising schedule. You'll reach 236,400 adults every day.

Reach the Tacoma portion of this market with a Tacoma newspaper. In terms of gaining results, it would be a far, far better thing to do.

For more information, contact Doug Harris at 206-597-8757 or talk to a Sawyer-Ferguson-Walker representative.

The Tacoma News Tribune

P.O. BOX 11000,
TACOMA, WASHINGTON 98411

POLL

THE INDEPENDENT BANNER

During the past two years, the science of measuring consumer purchasing behavior at the local retail level has grown at an accelerating and dramatic pace. The catalyst in this process has been the growing development of retail scanner research, wherein laser-equipped scanners read the Universal Product Code (UPC) on different kinds of products at supermarket checkout counters.

Today, merchandising and promotion move the needle when one measures the profitability in a week of facings of any brand. Accordingly, advertising agencies have to closely measure the benefits of brand promotion versus traditional advertising media. In many instances, budgets for sales promotion, market research and direct marketing are growing faster than conventional media budgets.

Driven by the simultaneous need to better understand consumer purchasing behavior at the local retail level and the desire to jump into what they perceive to be new profit centers, it is only natural that advertising agencies and other marketing organizations may decide to enter the 'high tech/high touch' information business. National Brand Scanning pioneered the measurement of product/brand movement (retail ratings) in 1975. As a spokesman for NabScan, I say welcome aboard to any new players, but I also offer several serious caveats.

Our executives specialize in sampling and projection systems and mathematical modeling. Each week we process millions of different UPC's from some 1,100 supermarkets across the nation. The sample is representative of the consumer behavior of some 20 million people.

NabScan's acquired experience in editing and processing these data and projecting and translating them into meaningful information cannot be easily nor inexpensively duplicated.

National Brand Scanning was acquired in 1985 by Mediamark Research Inc. and its financial parent, Mills & Allen Inc. The acquisition was motivated by our realization that the measurement of product brand movement has become a commodity business based on scanner tapes, not field surveys or audits. Secondly, this high tech source contained the largest syndicated research data base in history. Thirdly, it's clear the information from a scanner data base is richer in value than the traditional audit data.

Given the complexity of gathering and coordinating such research, an advertising agency should probably think twice before doing it themselves.

Alain J. Tessier is president of National Brand Scanning Inc. (NabScan), a division of Mediamark Research.

OUR READERS TELL US . . .

With the increasing shift of marketing dollars from advertising to promotion, the Ogilvy Group plans to follow suit. As part of its full service concept, the advertising agency is extending its sales promotion capabilities with a major move into supermarket shelf space management via scanner-collected data. The move would put the agency in direct competition with such suppliers as Information Resources Inc., Burke Marketing Services and A.C. Nielsen Co. Research USA, Chicago, went to agency research departments and asked, just how smart a move is this? (Base = 109)

(1) Do you feel that there is a need for another entrant into supermarket shelf space management?

Yes	36.7%
No	60.5%
Don't know/no answer	2.8%

(2) Is it the role of an agency to provide this service?

Yes	28.4%
No	69.8%
Don't know/no answer	1.8%

(3) Considering that a greater percentage of marketing dollars is going into promotion, is this a wise move for Ogilvy to make?

Yes	47.7%
No	46.8%
Don't know/no answer	5.5%

(4) Do you believe that the Ogilvy move will be imitated by other agencies?

Yes	51.4%
No	46.8%
Don't know/no answer	1.8%

(5) How often do you believe that such a service would be used by Ogilvy's clients?

Weekly	11.0%
Monthly	18.3%
Bi-monthly	3.7%
Quarterly	22.0%
Annually	6.4%
Rarely/never	19.3%
Don't know/no answer	19.3%

SALES PROMOTION

by Russ Bowman

MAKING PEACE WITH ADVERTISING

It's an old marketing conflict that seems to run in cycles. Whenever there is a significant increase in promotion spending, the ad agencies and their supporters look to protect the more traditional role of advertising in the media mix.

According to a recent advertising column in the *New York Times*, "The most fundamental change in consumer product marketing in the last few years has been the shift in expenditures from traditional media advertising to promotion."

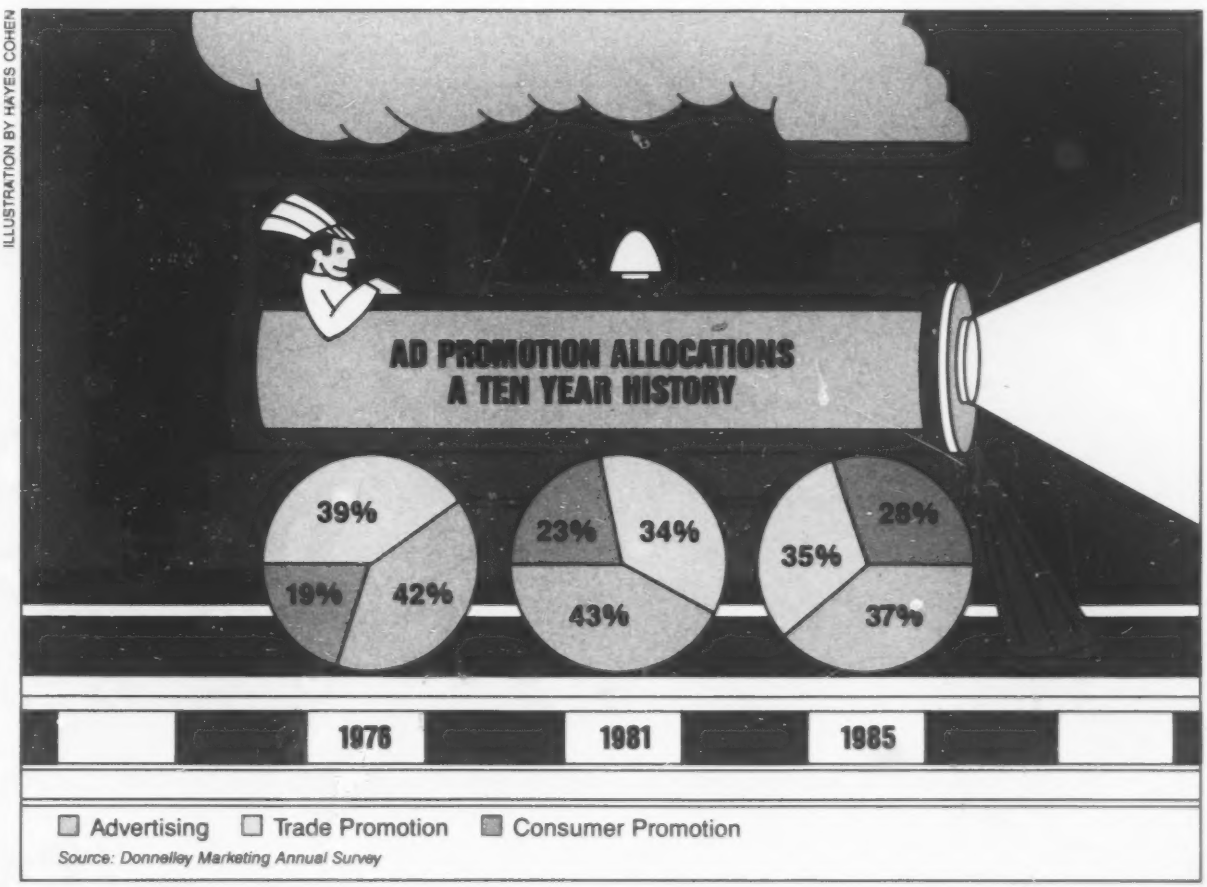
Donnelley's 8th annual survey of promotional practices seems to support this trend. Over a five-year period (1981 to 1985), it shows media advertising's share of total marketing expenditures declining from 43% to 35% while consumer promotion has grown from 23% to 30%. (Trade promotion has been more stable at approximately 35%.)

According to the "Advertising/Promotion Expenditures Report" in our July issue, promotion bucks hit $94.4 billion (a 14% increase over 1984) while advertising in the seven traditional commissionable media hit $54.8 billion (a 9% jump over 1984). That puts the advertising-to-promotion expenditures ratio at about 63% promotion/37% advertising in 1985.

The *Times* column previously mentioned goes on to point out that, "Critics say that promotions undermine the image-building investments in advertising." However, the article quotes Ed Meyer, vice president, director of promotion at DFS/Dorland, saying, "Marketers are also learning to use promotions to build brand images." Meyer illustrates his point with examples of promotions for charity by Procter & Gamble, American Express, Coors, etc.

The marketing Holy Grail lies somewhere in the middle of this age-old debate with the proper mix for the individual brand at any given point in its life cycle. Experience and specific research has shown in fact that a company will not necessarily lose adver-

ILLUSTRATION BY HAYES COHEN



tising values by a shift to greater emphasis on promotion.

Today many marketing managers try to look at their marketing efforts with a more liberal strategic approach to advertising/promotional roles. If one could view all those opportunities to reach and motivate the consumer as "consumer marketing communications," they would include: 1) all efforts that could communicate brand image and benefits; 2) all efforts to give the consumer an incentive to take action; and 3) those efforts that could do *both*. Surprisingly there are many marketing opportunities to do both. For example, inserted sheets in direct mail co-ops and pages in free-standing inserts generally achieve higher readership scores than full-page ads in consumer magazines.

Consider a second opportunity to get the best of both with pages scheduled in consumer magazines. Research has shown over the years that the addition of a promotional device in the ad will not hurt readership and in fact will increase it.

Agencies and marketers should aim for the synergism that results from the proper promotion/ advertising mix.

One Starch study of matched pairs of identical ads (with and without coupons) showed the ad with the coupon gained higher readership and other readership studies have shown similar results not only for coupon ads, but for ads with premium offers.

If agencies and marketers could devote more energy to the highly desirable synergism resulting from the proper mix of advertising and promotion than to a continuing battle to keep them separate, the end result would pay off in higher shares and "more boxes."

In summary, it seems that with media costs exploding, marketers should be exploring ways in which advertising and promotion can really achieve economy through cooperation. In fact, the time has come to put advertising and promotion together again. It's time to bury the hatchet in the age-old battle between sales promotion and advertising and recognize the fact that in the best marketing programs, they are very dependent upon each other.

Give them the sun and the moon.
Give your message to Dayton morning and evening with the newly combined Dayton Daily News and Journal Herald. Reach 76%* of Dayton with the frequency and flexibility you need.
COUNT ON US
for the news and more
Dayton Daily News
THE JOURNAL HERALD
Represented nationally by Sawyer Ferguson Walker, Inc.

ECONOMIC EYE

ON THE BOARDS

Change is the constant in the outdoor industry as seen today by Cathy Hodges, vice president, media and marketing at the Institute for Outdoor Advertising. What she doesn't see changing is outdoor's uphill climb.

For one thing, ownership is in flux. Since Gannett Outdoor launched its Outdoor Network USA of local outdoor agencies in 1984, Foster & Kleiser, the largest, was sold to Patrick Outdoor Advertising, and Rollins Outdoor and Naegele Outdoor, other biggies, have also changed hands. Nor have formats stayed constant. Ten years ago, Hodges notes, posters drew most of outdoor revenues. They still outnumber painted bulletins five to one, but draw only 45% of revenues.

Outdoor's core of advertisers is also changing. After tobacco and hard liquor advertisers were banned from the airwaves in the early 1970's, their influx of business was all it took to position outdoor as a national medium in Madison Avenue minds. That business is on the decline, Hodges confirms, but new, local advertisers are helping fill the gap.

Fred Pfaff

MAGAZINE AD SCORECARD

	Ad Pages Sept. 1985	% change from Sept. 1985	Dollars spent (000)	% change from Sept. 1985
1. Skin care, Creams, Lotions and Oils	152.72	−12.79%	$ 3,996.3	+9.28%
2. Lip and Eye Beauty Products	96.27	−16.36	3,089.9	−7.67
3. Scents and Fragrances	173.64	−14.82	4,581.2	−5.09
4. Facial Makeup Products	101.23	+40.77	3,916.4	+54.32
5. Prepared Dinners and Entrees (including Pizza)	28.17	−15.73	1,536.2	+2.20
6. Liquor	306.05	−22.28	13,298.0	−14.48
7. Cigarettes	562.43	−31.99	32,229.0	−24.04
8. Soaps and Detergents	41.89	+2.17	2,897.3	+7.11
9. Passenger Cars, Domestic	225.46	+43.70	14,708.1	+86.60
10. Passenger Cars, Imported	155.31	−22.97	7,570.6	−21.90

Source: Publishers Information Bureau as prepared by Leading National Advertisers

Largest Increases/Decreases in Outdoor Spending by Category*

Increases	Year-to-Date 2nd Qtr. 1985 (000)	Year-to-Date 2nd Qtr. 1986 (000)	% Change
Pets/Pet Food/Supplies/Organizations	$ 93.0	$ 472.8	+408.4%
Medical Insurance (HMO's, Health Plans)	793.6	3,196.6	+302.8
Industrial Materials (Chemicals, Plastics)	153.1	296.3	+94.6
Healthcare (Hospitals, Clinics, etc.)	3,438.0	5,112.5	+48.7
Travel/Hotels/Resorts	24,897.3	30,893.0	+24.9
Retail	18,962.2	23,471.0	+23.8
Decreases			
Beer/Wine/Liquor	37,922.7	26,942.7	−29.0
Apparel/Footwear/Accessories	2,487.1	1,749.3	−29.7
Sporting Goods/Toys/Games	194.7	133.0	−31.7
Building Materials/Equipment/Fixtures	1,051.0	712.8	−32.2
Household Equipment/Supplies	2,480.6	238.8	−90.3
Soaps/Cleaners/Polishes	109.1	3.9	−96.4

*Outdoor Advertising revenues as reported by LNA. These figures represent 40-60% of actual spending. *Source: Institute of Outdoor Advertising*

Historical Year-End Revenues For Posting and Paint and Average % Change Per Year

	Posting (000)	Paint (000)	Total (000)
1970	$163,706.6	$ 95,822.6	$ 259,529.3
1975	202,539.2	168,013.9	370,553.0
% Change Per Year	+4.4	+12.1	+7.5
1980	366,987.4	334,612.9	701,301.3
% Change Per Year	+12.6	+14.9	+13.6
1985	556,693.8	665,211.6	1,221,905.4
% Change Per Year	+8.7	+14.8	+11.8
1986 (Projected)	590,095.4	718,428.5	1,308,523.9

Source: Institute of Outdoor Advertising

Top 100 Metro Markets Ranked by Population 1986 Posting Rates & Allotments #50 GRP Showing

Markets	Regular	Illuminated	Cost Per Month
Markets 1-10	232	1,107	573,987.00
Markets 1-20	388	1,620	826,902.00
Markets 1-30	460	2,074	1,036,103.00
Markets 1-40	532	2,357	1,167,896.00
Markets 1-50	719	2,658	1,324,946.00
Markets 1-60	835	2,867	1,428,251.00
Markets 1-70	935	3,058	1,522,039.00
Markets 1-80	1,012	3,183	1,580,766.00
Markets 1-90	1,106	3,291	1,641,133.00
Markets 1-100	1,177	3,390	1,689,283.00

Source: Institute of Outdoor Advertising